

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE Materials and Stores Specialist	OFFICE/BRANCH/SECTION HQ Maintenance Warehouse	
WORKING TITLE Materials and Stores Specialist	POSITION NUMBER 913-700-1506-XXX	REVISION DATE 08/20/2026

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the general supervision of a Warehouse Manager II or Materials and Stores Supervisor, the Materials and Stores Specialist serves as a non-supervisory lead worker and assists with the coordination of daily warehouse operations. The incumbent provides work direction and guidance to lower-level warehouse staff and may provide operational support and continuity in the absence of warehouse management. The incumbent performs and coordinates activities related to receiving, shipping, order fulfillment, storage, inventory control, space utilization, property reutilization, freight services, and warehouse data management. The incumbent operates powered and non-powered material-handling equipment and promotes compliance with established safety practices, policies, and procedures. The incumbent is expected to exercise sound judgment, maintain accurate records, resolve operational and inventory issues, promote the responsible and efficient use of State resources, and provide timely and effective service to internal and external customers.

CORE COMPETENCIES:

As a Materials and Stores Specialist, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- Flexibility and Managing Uncertainty** : Adjusts thinking and behavior in order to adapt to changes in the job and work environment. (Employee Excellence - Innovation, Pride, Stewardship)
- Dealing with Ambiguity (Risk)**: Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Safety, Employee Excellence - Innovation, Stewardship)
- Reliability**: Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Climate Action - Collaboration, Integrity)
- Problem-solving and Decision-making** : Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Safety, Employee Excellence - Innovation, Integrity, Stewardship)
- Teamwork/Partnership**: Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Safety, Employee Excellence - Collaboration, Equity, People First)
- Organizational Awareness**: Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Integrity, Pride, Stewardship)
- Communication**: Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Safety, Equity, Climate Action, Prosperity, Employee Excellence - Integrity, Pride, Stewardship)
- Planning and Results Oriented**: Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Safety, Employee Excellence - Innovation, Pride, Stewardship)
- Thoroughness**: Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Safety, Employee Excellence - Integrity, Pride, Stewardship)

TYPICAL DUTIES:

Percentage
Essential (E)/Marginal (M)¹ Job Description

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

45%	E	Leads and performs daily warehouse activities involving the receipt, storage, movement, order fulfillment, and shipment of varied commodities requiring moderately complex storage and handling practices, Provides work direction, guidance, and assistance to lower-level warehouse staff and promotes compliance with established safety and operational procedures. Processes commodity orders, receives incoming materials, and verifies outgoing shipments for correct items and quantities. Coordinates the placement and movement of inventory to support efficient use of warehouse space. Operates various forklifts, pallet jacks, and other powered and non-powered material-handling equipment and uses ladders as necessary to access, move, store, and retrieve materials. Maintains required records and documentation and communicates with management, internal programs, district personnel, vendors and other stakeholders regarding warehouse operations.
45%	E	Utilizes the Material Management and Acquisitions (MMA), SmartBOL software, Microsoft Office applications, and other applicable systems to process orders, verify and reconcile inventory, track inbound and outbound shipments, research discrepancies, and prepare reports. Researches and resolves inventory, order, shipping, receiving and storage issues; identifies causes of discrepancies; recommends corrective action and operational improvements; and maintains accurate electronic and hard-copy records and data. Coordinates freight services and exercises sound judgment in selecting appropriate shipping methods and service levels, considering cost, delivery requirements, commodity characteristics, urgency, and operational needs to ensure the responsible and efficient use of State resources. Assists with inventory management, space utilization, property reutilization, and other activities necessary to support safe and efficient warehouse operations. Participates in Statewide Stores Meetings and other warehouse related meetings to share information, discuss operational issues and best practices, coordinate statewide activities, and support consistency and continuous improvement in warehouse operations.
5%	M	Performs required pre-operation inspections of Caltrans motorized vehicles and material-handling equipment and maintains required equipment documentation, including mileage and inspection records. Identifies and reports equipment deficiencies in accordance with established procedures.
5%	M	Performs other job-related duties as required.

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.
MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

The incumbent serves as a non-supervisory lead worker and provides work direction, guidance, training, and assistance to lower-level warehouse staff. The incumbent may assist in coordinating daily assignments, establishing work priorities, and monitoring workflow to support safe and efficient warehouse operations. The incumbent does not independently perform supervisory functions such as hiring, disciplinary actions, or formal performance evaluations.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent must have a working knowledge of standard warehouse operations and practices, including receiving, shipping, order fulfillment, storage, inventory control, material handling, space utilization, freight services, and applicable warehouse safety practices. The incumbent must be able to effectively use MMA, SmartBOL, Microsoft Office applications, computers, telephones, and other systems and equipment necessary to perform assigned duties. Must be able to understand and follow established policies, procedures and safety requirements and safely operate various types of powered and non-powered material-handling equipment. The incumbent must demonstrate attention to detail, effective organization and time management, sound judgment, and flexibility in responding to changing priorities, Must be able to analyze inventory discrepancies and operational problems, identify causes, develop or recommend appropriate solutions, maintain accurate records, and recommend improvements to warehouse processes and procedures.

The incumbent must be able to evaluate freight options based on cost, delivery requirements, commodity characteristics, urgency, and operational needs. The incumbent must demonstrate responsible stewardship of State resources and communicate effectively while providing clear work direction and guidance to lower-level staff.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for exercising sound judgment and maintaining accuracy in the receipt, storage, movement, inventory control, order fulfillment, and shipment of materials. The incumbent is responsible for verifying correct items and quantities, maintaining accurate inventory and operations records, appropriately utilizing warehouse space, and following established safety and operational procedures. The incumbent exercises sound judgment in the expenditure of State resources when coordinating and recommending freight services, including evaluating shipping methods, service levels, costs, delivery requirements, and operational needs to identify appropriate and cost-effective freight solutions. Errors or poor judgment may result in inaccurate inventory records, incorrect or delayed shipments, unnecessary or excessive freight expenditures, loss or damage to State property, inefficient use of warehouse space or staff resources, operational delays, fiscal impacts, or potential injury to employees or others.

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

PUBLIC AND INTERNAL CONTACTS

The incumbent has regular contact with warehouse personnel, management, Material Managers, Caltrans programs and districts, other State entities, vendors, freight carries, and other external parties. Contacts may involve coordinating orders, shipments, freight services, and deliveries; researching and resolving inventory or operational issues; providing information and assistance; and communicating warehouse requirements, procedures, and priorities. The incumbent is expected to communicate professionally and effectively, exercise tact and sound judgment, and maintain productive working relationships.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent must be able to perform warehouse activities that may require prolonged standing and walking and frequent bending, stooping, kneeling, reaching, pushing, pulling, climbing, and repetitive movement. Duties may require lifting, carrying, moving and handing cartons, commodities, and other materials weighting up to 75 pounds and assisting with oversized or heavy materials, including special signs that my exceed 100 pounds. The incumbent may be required to operate various types of forklifts and other powered material-handling equipment, use hand-operated pallet jacks, use ladders, and climb stairs to access elevated storage locations and mezzanine areas. Duties may require working at elevated heights and safely maneuvering materials and equipment within warehouse aisles, storage areas, loading areas, and other workspaces. The incumbent must maintain situational awareness when working around moving equipment and materials and must be able to maintain concentration and accuracy, manage multiple and changing priorities, resolve problems, make appropriate decisions, and communicate effectively in a warehouse environment.

WORK ENVIRONMENT

The incumbent works primarily in a warehouse environment and may also perform duties in an office setting. The warehouse environment may include exposure to moving forklifts and other material-handling equipment, vehicle traffic, noise, dust, artificial lighting, temperature variations, and other conditions associated with warehouse operations. Work may be performed at ground level, on ladders, and in elevated storage or mezzanine areas. The incumbent may also be required to work outdoors and travel to other locations and may be exposed to uneven surfaces, traffic, extreme temperatures and other weather or environmental exposure. The incumbent is required to follow established safety procedures and use appropriate personal protective equipment when required.

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
----------------------	------

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
------------------------	------